WE CLAIM:

1. A computer-based method for evaluating portfolio management, comprising:

interviewing a portfolio management industry expert thereby collecting:

A) a weighting determined by said industry expert of an evaluation category, and

B) responses from said industry expert to evaluation questions;

inputting said weighting and said responses into a computer analysis tool;

analyzing said responses to said evaluation questions in response to said weighting of said evaluation category using said computer analysis tool; and

reporting a computer generated analysis to said industry expert contemporaneously with said interviewing step, said inputting step and said analyzing step, wherein immediate results are provided to said industry expert and wherein scenarios of said weighting and said responses are immediately comparable.

2. The computer-based method according to claim 1, wherein said evaluation category comprises categories of value chain steps and performance attributes and wherein said evaluation questions comprise groups of questions organized within each of said value chain steps, some of said evaluation questions being directed to said performance attributes and being interspersed within said groups of questions;

wherein said weighting comprises a weighting determined by said industry expert for each of said value chain steps and said performance attributes; and

wherein said computer generated analysis comprises separate analyses for each of said value chain steps and said performance attributes.

3.   The computer-based method according to claim 2, wherein said value chain steps comprise profile assessment, asset allocation, asset selection, order generation, and reporting and monitoring.

5   4.   The computer-based method according to claim 2, wherein said performance attributes comprise automatization, scalability, and outsourcing and insourcing.

5.   The computer-based method according to claim 1, wherein
10   predetermined weightings of said evaluation questions are changeable in response to a determination by said industry expert.

6.   The computer-based method according to claim 1, wherein said computer generated analysis compares said responses to said evaluation
15   questions to said weighting of said evaluation category.

7.   The computer-based method according to claim 1, wherein said computer generated analysis comprises a plurality of separate analyses, each of said separate analyses comprising an automatic graphical flag identifying a
20   level of improvement potential.

8.   The computer-based method according to claim 1, wherein said computer generated analysis comprises a value tree analysis, said value tree analysis grouping said responses to said evaluation questions from different
25   categories of said evaluation category into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, said value tree analysis further comprising recommended solutions based on said effectivity result.

30   9.   The computer-based method according to claim 1, further comprising collecting said responses to said evaluation questions thereby

benchmarking said responses with responses to a same set of evaluation questions from another industry expert.

10. The computer-based method according to claim 1, further comprising collecting responses from said industry expert to benchmarking questions, wherein said benchmarking questions cluster and segment a company of said industry expert.

11. The computer-based method according to claim 1,

wherein said evaluation category comprises categories of value chain steps and performance attributes and wherein said evaluation questions comprise groups of questions organized within each of said value chain steps, some of said evaluation questions being directed to said performance attributes and being interspersed within said groups of questions;

wherein said weighting comprises a weighting determined by said industry expert for each of said value chain steps and said performance attributes;

wherein said computer generated analysis comprises separate analyses for each of said value chain steps and said performance attributes;

wherein predetermined weightings of said evaluation questions are changeable in response to a determination by said industry expert; and

wherein said computer generated analysis compares said responses to said evaluation questions to said weighting of said evaluation category.

12. The computer-based method according to claim 11, wherein said value chain steps comprise profile assessment, asset allocation, asset selection, order generation, and reporting and monitoring; and wherein said performance attributes comprise automatization, scalability, and outsourcing and insourcing.

13. The computer-based method according to claim 12, further comprising collecting said responses to said evaluation questions thereby

benchmarking said responses with responses to a same set of evaluation questions from another industry expert.

14.   The computer-based method according to claim 1, wherein said computer generated analysis comprises a first analysis comparing said responses to said evaluation questions to said weighting of said evaluation category; and wherein said computer generated analysis further comprises a second analysis, said second analysis grouping said responses to said evaluation questions from different categories of said evaluation category into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, said second analysis further comprising recommended solutions based on said effectivity result.

15.   The computer-based method according to claim 14, wherein said first analysis comprises a plurality of separate analyses, each of said separate analyses comprising an automatic graphical flag identifying a level of improvement potential.

16.   The computer-based method according to claim 1, wherein said evaluation questions comprise questions directed to profile assessment, asset allocation, asset selection, order generation, reporting and monitoring, automatization, scalability, and outsourcing and insourcing; further comprising collecting responses from said industry expert to benchmarking questions, wherein said benchmarking questions cluster and segment a company of said industry expert; and further comprising collecting said responses to said evaluation questions thereby benchmarking said responses with responses to a same set of evaluation questions from another industry expert.

17.   A computer-readable medium storing a program, said program directing a computer to analyze an interview and report results by executing the steps comprising:

receiving a weighting input of an evaluation category, said evaluation category being a category of a portfolio management process;

receiving response inputs to evaluation questions, said evaluation questions being questions about the performance of said portfolio

5 management process;

analyzing said response inputs to said evaluation questions in response to said weighting input of said evaluation category; and

outputting a report based on said analyzing step, wherein said report is reviewable contemporaneously with an interview of an industry

10 expert, thereby providing immediate results to said industry expert and wherein scenarios of said weighting input and said response inputs are immediately comparable.

18. The computer-readable medium according to claim 17,

15 wherein said evaluation category comprises categories of value chain steps and performance attributes and wherein said evaluation questions comprise groups of questions organized within each of said value chain steps, some of said evaluation questions being directed to said performance attributes and being interspersed within said groups of questions;

20 wherein said weighting comprises a weighting determined by said industry expert for each of said value chain steps and said performance attributes; and

wherein said computer generated analysis comprises separate analyses for each of said value chain steps and said performance attributes.

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19. The computer-readable medium according to claim 18, wherein said value chain steps comprise profile assessment, asset allocation, asset selection, order generation, and reporting and monitoring.

30 20. The computer-readable medium according to claim 18, wherein said performance attributes comprise automatization, scalability, and outsourcing and insourcing.

21. The computer-readable medium according to claim 17, wherein predetermined weightings of said evaluation questions are changeable in response to a determination by said industry expert.

22. The computer-readable medium according to claim 17, wherein said computer generated analysis compares said responses to said evaluation questions to said weighting of said evaluation category.

23. The computer-readable medium according to claim 17, wherein said computer generated analysis comprises a plurality of separate analyses, each of said separate analyses comprising an automatic graphical flag identifying a level of improvement potential.

24. The computer-readable medium according to claim 17, wherein said computer generated analysis comprises a value tree analysis, said value tree analysis grouping said responses to said evaluation questions from different categories of said evaluation category into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, said value tree analysis further comprising recommended solutions based on said effectivity result.

25. The computer-readable medium according to claim 17, further comprising collecting said responses to said evaluation questions thereby benchmarking said responses with responses to a same set of evaluation questions from another industry expert.

26. The computer-readable medium according to claim 17, further comprising collecting responses from said industry expert to benchmarking questions, wherein said benchmarking questions cluster and segment a company of said industry expert.

27.   The computer-readable medium according to claim 17,
wherein said evaluation category comprises categories of value chain
steps and performance attributes and wherein said evaluation questions
comprise groups of questions organized within each of said value chain steps,
5   some of said evaluation questions being directed to said performance
attributes and being interspersed within said groups of questions;
wherein said weighting comprises a weighting determined by said
industry expert for each of said value chain steps and said performance
attributes;
10   wherein said computer generated analysis comprises separate
analyses for each of said value chain steps and said performance attributes;
wherein predetermined weightings of said evaluation questions are
changeable in response to a determination by said industry expert; and
wherein said computer generated analysis compares said responses to
15   said evaluation questions to said weighting of said evaluation category.

28.   The computer-readable medium according to claim 27, wherein
said value chain steps comprise profile assessment, asset allocation, asset
selection, order generation, and reporting and monitoring; and wherein said
20   performance attributes comprise automatization, scalability, and outsourcing
and insourcing.

29.   The computer-readable medium according to claim 28, further
comprising collecting said responses to said evaluation questions thereby
25   benchmarking said responses with responses to a same set of evaluation
questions from another industry expert.

30.   The computer-readable medium according to claim 17, wherein
said computer generated analysis comprises a first analysis comparing said
30   responses to said evaluation questions to said weighting of said evaluation
category; and wherein said computer generated analysis further comprises a
second analysis, said second analysis grouping said responses to said

evaluation questions from different categories of said evaluation category into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, said second analysis further comprising recommended solutions based on said effectivity result.

31.   The computer-readable medium according to claim 30, wherein said first analysis comprises a plurality of separate analyses, each of said separate analyses comprising an automatic graphical flag identifying a level of improvement potential.

32.   The computer-readable medium according to claim 17, wherein said evaluation questions comprise questions directed to profile assessment, asset allocation, asset selection, order generation, reporting and monitoring, automatization, scalability, and outsourcing and insourcing; further comprising collecting responses from said industry expert to benchmarking questions, wherein said benchmarking questions cluster and segment a company of said industry expert; and further comprising collecting said responses to said evaluation questions thereby benchmarking said responses with responses to a same set of evaluation questions from another industry expert.